DOCUMENT RESUME

ED 208 490 EA 013 972

AUTHOR Long, Dan F.; Phipps, Bill W.
TITLE Evaluation of School Business Services. A Model Using Local Business Executives as Consultants.
PUB DATE 80
NOTE 9p.

EDRS PRICE MF01/PC01 Plus Postage.
DESCRIPTORS Consultants; Educational Finance; Elementary Secondary Education; *Evaluation Methods; *Program Evaluation; *School Business Officials; School Business Relationship

ABSTRACT

The model outlined here is one that has been used with great success in various districts to prepare an evaluation of the district's business operations. The key ingredient is local business executives who are usually quite willing to participate once the importance of the project and the quality of the team members are explained to them. Another key element is the presence of business officials from other school districts. The out-of-town school business officials are teamed with executives in every area that a district wants evaluated. The visiting school official can provide the executives with the proper background to understand the district's operation and the unique problems of tax-supported institutions. The evaluation group should answer questions about the district's strengths and weaknesses and make recommendations to improve its operations. From the process, the district should gain compliments, constructive criticism, suggestions for change, a new group of supporters, credibility, future leaders for community decision-making, learning experiences for the participants, and a low-cost evaluation. Costs are kept low as a fee is paid only to a full-time chairperson for the committee, while the travel, meal, and lodging expenses of the members are paid. (Author/IRT)

****
* Reproductions supplied by EDRS are the best that can be made *
* from the original document. *
****

ED208490

U.S. DEPARTMENT OF EDUCATION
NATIONAL INSTITUTE OF EDUCATION
EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)
X This document has been reproduced as received from the person or organization originating it.
Minor changes have been made to improve reproduction quality.
• Points of view or opinions stated in this document do not necessarily represent official NIE position or policy.

EVALUATION OF SCHOOL BUSINESS SERVICES

A MODEL USING LOCAL BUSINESS EXECUTIVES AS CONSULTANTS

Dan F. Long
Superintendent
Carrollton-Farmers Branch I.S.D.
Carrollton, Texas 75006

Bill W. Phipps
Assistant Superintendent for Business
Conroe I.S.D.
Conroe, Texas 77301

1980

EA013772

PERMISSION TO REPRODUCE THIS MATERIAL HAS BEEN GRANTED BY
Dan F. Long
TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC).

A recent issue of School Business Affairs, the professional journal of the Association of School Business Officials of the United States and Canada, included an advertisement seeking the names of consultants who could evaluate the business services of a school system. This request for help is an indication of a widespread concern on the part of school board members and educators about the efficiency and effectiveness of their business operations. More and more frequently, the taxpayer is raising questions about the business functions of public schools. These are legitimate questions which members of the management team, both board members and administrators, should be prepared to answer. However, all too often, the management team cannot reply to inquiries about the operations with any degree of accuracy.

The public is due an objective report on the business operations of any school district, but how can a school system provide one? Often a fortunate school system will call in a major consulting firm and with the payment of a rather handsome fee receive a voluminous report. Depending on the consulting firm used, and not the price paid, the report can range in value from extremely worthwhile to practically worthless.

However, not many communities are inclined to spend large amounts of local funds for evaluation. Does this mean evaluation is impossible or impractical? No, there is a simple, low cost evaluation process which is available to nearly all public school systems.

Surprising as it may seem, the help the school district needs is available for the asking. It is almost like a large grant from American industry. At the disposal of the local school system are the most eminently qualified consultants in the business world. Business managers who would receive large consultant fees in commerce and industry will serve without cost to "their" community schools. How can a board member, a superintendent, or a business manager who is interested in determining the efficiency and effectiveness of his/her business operations get these services?

Although several models exist for tapping the resources in the business community, the one outlined briefly below has been used repeatedly in various sized districts with great success. Unfortunately, the procedure remains one of America's best kept secrets. A word of caution -- this evaluation is not for those who don't want the truth known. However, it is for those who want to be open and honest with their taxpayers.

The vast majority of business executives feel an obligation to perform civic duties, and the public schools can easily give them an opportunity to serve. The management of public school systems must discreetly discover the most talented and respected individuals in the business community and extend to them an invitation to help. The desire to be of service, the opportunity to change their daily pace, the privilege of working with other business leaders, and their curiosity about how the school system really functions provide strong motivation. Few business leaders can resist the invitation to join the evaluation team. If the importance of the project and the quality of the team members are adequately explained, these businessmen will be flattered by the request to serve. Besides, the successful business person will relish the challenge.

Credibility is one great advantage which the evaluation report by business persons has over one prepared by a consulting firm. Many citizens view with jaundiced eye any self-report on governmental operations or a report commissioned and paid for by a governmental unit. The credibility of the report is established by the reputation of the outstanding business leaders judged by the public to be objective in their investigating and reporting. Business persons will be heard because they come from the "real world."

Simply stated, the evaluation team should answer three questions:

(1) What are the strengths of the business operations?
(2) What are the weaknesses of the business operations?
(3) What recommendations can the experts make which would improve the operations?

When the evaluation of the business functions is completed the following benefits should accrue to the school district:

(1) COMPLIMENTS. Most evaluators from business will be pleasantly surprised by the quality of the school district's frugal business operations.
(2) CONSTRUCTIVE CRITICISMS. Every organization has weaknesses.
(3) SUGGESTIONS FOR CHANGE. This can take many forms when the creative talents of people with the best training and experience are applied to school business operations.
(4) A NEW GROUP OF SUPPORTERS. After viewing the district's operations and working with the staff, these representatives from business will form a new nucleus of understanding taxpayers out in the "real world." A new group of communicators will be developed.
(5) CREDIBILITY FOR SCHOOL DISTRICT ORGANIZATIONS. Because of their unique position in the community, the statements from the team about school business functions will be readily accepted by the public.
(6) FUTURE LEADERS FOR COMMUNITY DECISION MAKING. The team members' value in future bond elections, tax controversies, major expenditures or any other related matters can be great.
(7) LEARNING EXPERIENCES FOR THE PARTICIPANTS. The consultants can learn from each other. The members of the visiting team develop a bond among themselves that is positive and lives on long after the evaluation report is complete.
(8) LOW COST EVALUATION. Food, lodging, and travel are the major costs required in the evaluation process.

A successful evaluation team must have another important element -- school business officials from other school systems. Carefully selected business administrators who have earned respect in the spheres of education and business should also be invited to participate in the study. They will be paired with a consultant from the business world and work in their area of expertise for two reasons:

(1) School business officials understand the unique problems of a tax-supported institution. This knowledge reduces the time required to get to the heart of the matter. They can serve as a guide or an interpreter to the business person.

(2) School business officials can remind their business person partners that schools are not merchandising or manufacturing organizations. This fact is important because the school district's business services staff will not constantly have to remind the team of the limits of a public organization. Invariably, the school district's employee will sound defensive on such matters, while the visiting public school administrator can be objective and not have his/her credibility challenged by the individual from business.

School officials will be anxious to be a part of such a novel study. They recognize the prestige and the opportunity to learn that will accompany the invitation. Because of the heavy responsibility of the visiting school business officials, the persons selected must be competent in their fields of specialization. Distance travelled does not increase the competence of the team member. Their skills will be apparent when they guide the consultants from the business world in developing a report which can be effectively utilized by a public institution. The criterion for any evaluation is not the size nor sophistication of the report, but its practical value in improving the operation of the organization evaluated.

But what will an evaluation using business persons and visiting administrators cost a district?

This evaluation model costs only a fraction of the typical evaluation. Costs fall into the following categories:

(1) The school district should plan to pay for food, travel, and lodging for the visiting team.
(2) The only fee involved is the one paid to the chairperson. He/she should be an outstanding public school administrator who can plan with the school district management team, coordinate and direct the efforts of the evaluation team, and compile and edit the final report. Other team members will eagerly volunteer their time, but the time necessary for this job necessitates a stipend based on the time required to complete a comprehensive report. Business persons and school business officials who would ordinarily receive large fees, if you could purchase their time, will serve as a public duty without a thought of remuneration.

The size of the team will depend on the size of the operation. As a minimum, one business consultant and one public school consultant should be used on each major operations area in the school business division -- finance, purchasing, transportation, maintenance, operations, food service, and the tax office.

What a great public relations opportunity! The news media will be fascinated with the idea of involving business persons in an evaluation and as a result will give extensive coverage on the efforts to bring accountability into the school district business functions. School management will have to look hard and long to find a better way to sell both friends and critics alike that the school system is truly making good use of resources entrusted to them.

SUGGESTED STEPS IN THE EVALUATION OF BUSINESS SERVICES

1. Evaluation initiated by board of education, superintendent, or business manager

2. Get board authorization, commitment

3. Select chairperson

4. Arrange meeting of superintendent, business manager, chairperson (paid consultant)
   - -develop rationale
   - -lay out basic plan
   - -set time line
   - -develop budget
   - -set per diem
   - -agree on fee for chairperson
   - -select 5-8 areas to be evaluated
     - -finance
     - -transportation
     - -food service
     - -maintenance) sometimes combined
     - -operations)
     - -purchase/warehousing
     - -tax office

5. Arrange meeting of superintendent, business manager, chairperson, board president (or board representative)
   - -finalize formal plan of evaluation
   - -develop plan of communication

6. Arrange meeting of superintendent, business manager, department heads in business division
   - -stress high priority set on evaluation project
   - -emphasize that this will be an evaluation of operations, not persons

7. Arrange meeting of entire management team
   - -explain program
   - -sell, sell, sell

8. Announce plans to news media

9. Conduct a self-study of each department
   - -allow sufficient time for first class report
   - -make it a learning experience for the staff
   - -improvement will begin before the consultants arrive

10. Assemble names of potential business consultants
    -get the best people available
    -go out of the district when necessary
    -avoid any conflicts of interest
    -strive for balance on the team
    -potential consultants from business and industry
        -Finance: CPA, comptroller, VP for finance-treasurer
        -Transportation: fleet operator (bus or truck)
        -Food Service: restaurant chain, cafeteria chain, contract supplier
        -Maintenance: plant engineer)
        -Operations: operations chief) representative from utilities company
        -Purchasing: purchasing agent of large firm
        -Tax: assessor-collector from city, county, or other governmental subdivision

11. Superintendent, business manager, and chairperson select visiting team of business persons

12. Superintendent, business manager, and chairperson select a co-chairperson from business persons

13. Superintendent and business manager assemble names of outstanding school business administrators

14. Superintendent, business manager, and chairperson select school business administrators

15. Send letter of invitation to business persons and school administrators and their superiors signed by board president and superintendent

16. arrange for facilities
    -housing
    -food
    -work space

17. Arrange for secretarial and clerical support

18. Send confirmation letters and information folders
    -maps
    -proposed schedules
    -basic information about school district
    -housing information
    -list of all visiting committee members and their positions
    -job descriptions
    -last audit report
    -current financial reports
    -newsletter or house organ
    -several current board meeting agenda
    -regional accrediting agency report

19. The self-study
    -print
    -send to each consultant and department head

20. Continue communication with staff members
    -repeat purposes of evaluation
    -develop enthusiasm for project
    -attempt to reduce apprehensions of the staff members

21. Set final schedule for evaluation team

    -Sunday PM
      -reception (informal) and dinner with top level school district administrators, business division administrators, visiting team, board
      -department heads hosts to their counterparts
      -planning sessions conducted by chairpersons

    -Monday AM
      -group breakfast
      -planning session
      -visit departments (department heads will furnish transportation)

    -Monday PM
      -lunch in school facilities (unscheduled)
      -visit departments (department heads will furnish transportation)
      -meeting of team for review and planning
      -dinner (unscheduled)
      -work on first day's observations

    -Tuesday AM
      -breakfast (unscheduled)
      -visit departments

    -Tuesday PM
      -lunch in school facilities (unscheduled)
      -visit departments
      -dinner (unscheduled)
      -team meeting

    -Wednesday AM
      -breakfast (unscheduled)
      -begin writing
      -revisit departments when necessary

    -Wednesday PM
      -lunch with board, superintendent, business manager, department heads
      -give team members small gifts (e.g., pen and pencil sets)
      -give team members certificate of appreciation
      -collect expense statements
      -continue writing reports (team members leave after turning in reports in draft form)
      -chairperson and co-chairperson hold press conference to explain process, team make-up and time table for report; no evaluation results should be released until report is completed.

22. Chairperson edits report and sends copy to co-chairperson for editing suggestions.

23. Send "thank you" letters to each team member
    -from president of board and superintendent
    -from department heads to their counterparts

24. Chairperson sends edited draft of report to district to be typed and printed
    -format of report
        -title page
        -table of contents
        -letter of transmittal from chairperson to superintendent
        -scope of survey
        -strengths
        -recommendations and benefits
        -comments and recommendations on each department
        -conclusion
        -evaluation team

25. Chairperson reports to the school board at a regular meeting
    -oral review of evaluation report is made
    -printed copies distributed
    -news media receives special invitation to attend board meeting and a copy of report

26. Distribute copies of report
    -each evaluation team member
    -management team
    -news media
    -libraries
    -major tax payers
    -PTA Council and local presidents

27. Arrange a meeting with department supervisors
    -review report
    -develop a plan of action
    -set a time line
    -present plan of action to the board

28. Follow-up on changes in operation at the end of one year and report findings to the board.